

Disability Income Benefits

US Department of Veterans Affairs

Veterans Income Benefits

Counting Veterans Income Benefits for:

- SSI Related Medicaid
- Long Term Care

What's inside...

- ✓ Veteran Income Benefit Categories
- ✓ Extra Payments
- ✓ The Improved Pension Income Disregard
- ✓ How to Figure Out the Amount for the Various Components
- ✓ The **Improved Pension** Calculator
- ✓ How the Components Count for SSI Related and Long Term Care Medicaid
- ✓ **LTC Only** – VA and Third-Party Resources



Why Do You Need to Know This....

- VA income benefits are comprised of different components
- For some benefit types the amount of the components will vary from one claimant to another
- Some components count toward eligibility
- Some components don't count toward eligibility
- VA doesn't give us verification of the amounts for each component – only the total benefit and how it was determined
- **WE** must determine the amount of each component and how that component is counted for eligibility

VA Disability Income Categories

Pensions

- Needs Based
 - Household income from other sources affects benefit amount
- Disability did not have to occur as a result of veteran's military service
- Pensions are paid to either the veteran or the surviving spouse

Compensation and DIC

- Not needs based
 - Household income from other sources ***doesn't*** affect benefit amount
- Disability is a result of veteran's military service
- Compensation is paid while veteran is alive
- DIC is paid to the veteran's surviving spouse or children when the veteran died during active duty service or due to injuries received during active duty service

Needs-Based Disability Pensions



Household income affects pension eligibility:

- VA pensions are disability payments – not retirement
- Three pension programs:
 - Old Law – program ended 6/30/60
 - Section 306 – program ran from 1/1/60 – 12/31/78
 - Improved Pensions – program started 1/1/79

Old Law Disability Pensions

- Paid to veterans or survivors
- No dependent allowance component
- If claimant's income is below a **Magical Mystical** income cap, the person is eligible for the benefit
- First pension program
- New claim approvals ended 7/1/60
- Some individuals still receive pension through this program



Old Law add-ons

These are extra payments the veteran receives in addition to the basic pension amount:

- **Aid & Attendance**

- Pays for a care provider
- Similar functional criteria as COPES

- **Housebound**

- Similar to A&A but pays less
- Awarded when veteran or survivor cannot do shopping or run errands

NOTE: The veteran does not receive dependent allowances.

Finding the Old Law Amounts for the veteran on the VA Benefit Rate Chart

VETERAN STATUS	SPANISH AMERICAN WAR PENSION	OLD LAW PENSION PRIOR TO JULY 1, 1960	SECTION 306 JAN 1, 1960 TO DEC 31 1978	IMPROVED PENSION NOTE: No changes in maximum benefit Amount since December, 2008					
<i>Last COLA 12/2008</i>				Dec-05	Dec-06	Dec-07	Dec-08	Diff	Allow.
Veteran Alone		\$78.75	\$197	\$881	\$910	\$931	\$985		
With 1 Dependent			\$212	\$1,154	\$1,192	\$1,220	\$1,291	\$306	Dep
With A&A Alone		\$135.45	\$362	\$1,470	\$1,519	\$1,554	\$1,644	\$659	A&A
With 1 Dependent			\$377	\$1,743	\$1,801	\$1,842	\$1,949	\$964	Dep/AA
With HB Alone		\$100.00	\$258	\$1,077	\$1,113	\$1,138	\$1,204	\$219	HB
With 1 Dependent	each add/l child add \$159		\$273	\$1,350	\$1,395	\$1,427	\$1,510	\$525	Dep/HB

Finding the Old Law Amounts for the veteran on the VA Benefit Rate Chart

VETERAN STATUS	OLD LAW PENSION PRIOR TO JULY 1, 1960
<i>No COLA 2011</i>	
Veteran Alone	\$78.75
With 1 Dependent	
With A&A Alone	\$135.45
With 1 Dependent	
With HB Alone	\$100.00
With 1 Dependent	

	Basic		A&A or Housebound		Total Benefit
Veteran plus A&A	\$78.75	+	\$56.70	=	\$135.45
Veteran plus Housebound	\$78.75	+	\$21.25	=	\$100.00

Code Amounts Separately in ACES

TRAINING		UNEARNED INCOME - UNER				UNER 01		
Month 01 11		REPE 12 13 10				01		
Client Name JAVA		JOE		Client ID 002451222				
Src	End Date	Claim Number	Lump	Sm	Dt	Sep	Exp	Exp Amt V
VA		OLD LAW PENS						
Inc		Del	-----				Calc Inc 78.75	
Mthd	Freq	Amt 1 V	Amt 2 V		Amt 3 V		Amt 4 V	Extra V
AM		78.75 AL						
Src	End Date	Claim Number	Lump	Sm	Dt	Sep	Exp	Exp Amt V
VT		OLD LAW A&A						
Inc		Del	-----				Calc Inc 21.25	
Mthd	Freq	Amt 1 V	Amt 2 V		Amt 3 V		Amt 4 V	Extra V
AM		56.70 AL						
More								
Application/Benefit		Application/Benefit		Application/Benefit		Application/Benefit		
Ever received	Type	Stat	Date	Del	Type	Stat	Date	Del
SSI?								
Message								
15-solq			20-lmen			24-del		

Code Amounts Separately in ACES

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      TRAINING
Month 01 11
      UNEARNED INCOME - UNER
      REPE 12 13 10
      UNER 01
      01

Client Name JAVA      JOE      Client ID 002451222

Src  End Date  Claim Number  Lump Sm Dt  Sep  Exp  Exp Amt V
VA    OLD LAW PENS
Inc    Del  ----- Calc Inc  78.75
Mthd   Freq  Amt 1  V  Amt 2  V  Amt 3  V  Amt 4  V  Extra  V
AM    78.75 AL

Src  End Date  Claim Number  Lump Sm Dt  Sep  Exp  Exp Amt V
VT    OLD LAW HB
Inc    Del  ----- Calc Inc  21.25
Mthd   Freq  Amt 1  V  Amt 2  V  Amt 3  V  Amt 4  V  Extra  V
AM    21.25 AL

More

Application/Benefit
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Message

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Section 306 Disability Pensions

- Paid to veterans or survivors
- If claimant's income is below a **Magical Mystical** income cap, the person is eligible for the benefit
- Pension program began in 1/1/60
- New claim approvals ended 12/31/78
- Some individuals still receive pension through this program
- Dependent allowances are the income of the dependent for whom it is paid



Finding the Section 306 Amounts for the veteran on the VA Benefit Rate Chart

VETERAN STATUS	SPANISH AMERICAN WAR PENSION	OLD LAW PENSION PRIOR TO JULY 1, 1960	SECTION 306 JAN 1, 1960 TO DEC 31 1978	IMPROVED PENSION NOTE: No changes in maximum benefit Amount since December, 2008					
<i>Last COLA 12/2008</i>				Dec-05	Dec-06	Dec-07	Dec-08	Diff	Allow.
Veteran Alone		\$78.75	\$197	\$881	\$910	\$931	\$985		
With 1 Dependent			\$212	\$1,154	\$1,192	\$1,220	\$1,291	\$306	<i>Dep</i>
With A&A Alone		\$135.45	\$362	\$1,470	\$1,519	\$1,554	\$1,644	\$659	<i>A&A</i>
With 1 Dependent			\$377	\$1,743	\$1,801	\$1,842	\$1,949	\$964	<i>Dep/AA</i>
With HB Alone		\$100.00	\$258	\$1,077	\$1,113	\$1,138	\$1,204	\$219	<i>HB</i>
With 1 Dependent	each add/l child add \$159		\$273	\$1,350	\$1,395	\$1,427	\$1,510	\$525	<i>Dep/HB</i>

Finding the Section 306 Amounts for the veteran on the VA Benefit Rate Chart

	Basic		Dependent Allowance		A&A or Housebound		Total Benefit
Veteran & spouse	\$197	+	\$15	+		=	\$212
Veteran (no spouse) plus A&A	\$197	+		+	\$165	=	\$362
Veteran, spouse and A&A	\$197	+	\$15	+	\$164	=	\$377
Veteran (no spouse) plus Housebound	\$197	+		+	\$61	=	\$258
Veteran, spouse and Housebound	\$197	+	\$15	+	\$61	=	\$273

Code Amounts Separately in ACES

TRAINING		UNEARNED INCOME - UNER						UNER 01	
Month 01 11		REPE 12 13 10						01	
Client Name JAVA		JOE				Client ID 002451222			
Srcce	End Date	Claim Number		Lump	Sm	Dt	Sep	Exp	Exp Amt V
VA		668382110							
Inc		Del	----- Calc Inc 78.75						
Mthd	Freq	Amt 1	V	Amt 2	V	Amt 3	V	Amt 4	V Extra V
AM		197.00	AL						
Srcce	End Date	Claim Number		Lump	Sm	Dt	Sep	Exp	Exp Amt V
Inc		Del	----- Calc Inc						
Mthd	Freq	Amt 1	V	Amt 2	V	Amt 3	V	Amt 4	V Extra V
More									
Application/Benefit		Application/Benefit		Application/Benefit		Application/Benefit		Application/Benefit	
Ever received	Type	Stat	Date	Del	Type	Stat	Date	Del	Del
SSI?									
Message									
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Code Amounts Separately in ACES

TRAINING

UNEARNED INCOME - UNER

UNER 02

Month 01 11

Community Spouse

01

Client Name JO

JOE

Client ID 002451267

Srce	End Date	Claim Number	Lump	Sm	Dt	Sep	Exp	Exp Amt	V
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VA		Sec 306 Dep							
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Inc		Del	-----					Calc Inc	
-----	--	-----	-------	--	--	--	--	----------	--

Mthd	Freq	Amt 1	V	Amt 2	V	Amt 3	V	Amt 4	V	Extra	V
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AM		15.00	AL	-							
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Srce	End Date	Claim Number	Lump	Sm	Dt	Sep	Exp	Exp Amt	V
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Inc		Del	-----					Calc Inc	
-----	--	-----	-------	--	--	--	--	----------	--

Mthd	Freq	Amt 1	V	Amt 2	V	Amt 3	V	Amt 4	V	Extra	V
------	------	-------	---	-------	---	-------	---	-------	---	-------	---

More

Ever received SSI?	Application/Benefit Type	Stat	Date	Del	Application/Benefit Type	Stat	Date	Del
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Improved Disability Pensions

- Current pension program
- Other household income reduces the benefit dollar for dollar
- Out-of-pocket medical expenses can be claimed for the veteran and dependents
- These medical expenses can offset other household income and restore some or all of the benefit
- Benefits restored due to claimed medical expenses are excluded for medical eligibility

Income Disregard due to Medical Expenses (UME)

- This disregard is called Unusual Medical Expenses (UME)
- **ONLY** used for the Improved Pension program
- Other household income decreases the total amount of Improved Pension benefits dollar-for-dollar (except SSI)
- Out-of-pocket medical expenses can be used to disregard the income the household receives from other sources
- The portion of the benefit that is paid because of the UME disregard is excluded
- The Excel calculator was created to help you determine how much of the Improved Pension is paid because of UME

Finding the Improved Pension Amounts for the veteran on the VA Benefit Rate Chart

VETERAN STATUS	SPANISH AMERICAN WAR PENSION	OLD LAW PENSION PRIOR TO JULY 1, 1960	SECTION 306 JAN 1, 1960 TO DEC 31 1978	IMPROVED PENSION EFFECTIVE JAN 1, 1979 <i>This Rate is for CY 2012 @ 3.6% COLA Increase</i>					
COLA 3.6% Increase				Dec-06	Dec-07	Dec-08	Dec-11	Diff	Allow.
Veteran Alone		\$78.75	\$197	\$910	\$931	\$985	\$1,021		
With 1 Dependent			\$212	\$1,192	\$1,220	\$1,291	\$1,337	\$316	Dep
With A&A Alone		\$135.45	\$362	\$1,519	\$1,554	\$1,644	\$1,703	\$682	A&A
With 1 Dependent			\$377	\$1,801	\$1,842	\$1,949	\$2,019	\$998	Dep/AA
With HB Alone		\$100.00	\$258	\$1,113	\$1,138	\$1,204	\$1,248	\$227	HB
With 1 Dependent	each add'l child add \$174		\$273	\$1,395	\$1,427	\$1,510	\$1,564	\$543	Dep/HB

Finding the Improved Pension Amounts for the veteran on the VA Benefit Rate Chart

VETERAN STATUS	IMPROVED PENSION EFFECTIVE JAN 1, 1979 <i>This Rate is for CY 2012 @ 3.6% COLA Increase</i>		
	COLA 3.6% Increase	Dec-11	Diff Allow .
Veteran Alone		\$1,021	
With 1 Dependent		\$1,337	\$316 <i>Dep</i>
With A&A Alone		\$1,703	\$682 <i>A&A</i>
With 1 Dependent		\$2,019	\$998 <i>Dep/AA</i>
With HB Alone		\$1,248	\$227 <i>HB</i>
With 1 Dependent		\$1,564	\$543 <i>Dep/HB</i>

- Amounts shown are maximum benefit amounts
- Other household income reduces these dollar-for-dollar

Order of reduction

- The benefit components are reduced by other income of the household (including dependent's income) in the following order:
 - Basic Pension
 - Dependent Allowances
 - Housebound Allowance

Improved Pension Benefit Mix

Improved Pension Example 1:

Veteran without dependents receives an Improved Pension including A&A. No other household income

- **Veteran Receives \$1703 the Maximum VA Benefit Amount**
- **Code the benefit components separately in ACES:**
 - \$1021 Basic Pension is countable for medical
 - UNER code **VI**
 - \$682 A&A is excluded for medical
 - UNER code **VT**

Code Amounts Separately in ACES

TRAINING **UNEARNED INCOME - UNER** **UNER 01**
 Month 06 12 REPE 12 14 10 01

Client Name JAVA JOE Client ID 002451222

Src	End Date	Claim Number	Lump	Sm	Dt	Sep	Exp	Exp Amt	V
VI		BASIC PENS							
Inc		Del	-----						Calc Inc 1021.00
Mthd	Freq	Amt 1 V	Amt 2 V			Amt 3 V		Amt 4 V	Extra V
AM		1021.00 AL							

Src	End Date	Claim Number	Lump	Sm	Dt	Sep	Exp	Exp Amt	V
VT		IMPR PEN A&A							
Inc		Del	-----						Calc Inc 682.00
Mthd	Freq	Amt 1 V	Amt 2 V			Amt 3 V		Amt 4 V	Extra V
AM		682.00 AL							

More

Ever received SSI?	Application/Benefit Type	Stat	Date	Del	Application/Benefit Type	Stat	Date	Del

Message

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Improved Pension Benefit Mix

Improved Pension Example 2:

Veteran without dependents receives an Improved Pension including A&A. Also receives \$900 SSA.

- **Veteran receives \$803 VA**
 - **\$121 Basic Pension is countable for SSI related medical**
 - UNER Code VI
 - **\$682 A&A is excluded for SSI related medical**
 - UNER Code VT
-
- Maximum VA Benefit Amount is \$1703
 - \$1021 Basic
 - \$682 A&A
 - VA first reduces the Basic pension by the other household income.
 - $\$1021 - \$900 = \$121$ Countable Basic Pension
 - All other household income has been used so the A&A is not reduced.

Code Amounts Separately in ACES

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TRAINING                                UNEARNED INCOME - UNER                                UNER 01
Month 06 12                             REPE    12 14 10                                01

Client Name JAVA                        JOE                                Client ID 002451222

Srce  End Date  Claim Number  Lump Sm Dt  Sep  Exp  Exp Amt V
VI     BASIC PENS
Inc    Del ----- Calc Inc 121.00
Mthd   Freq    Amt 1 V    Amt 2 V    Amt 3 V    Amt 4 V    Extra V
AM     121.00 AL

Srce  End Date  Claim Number  Lump Sm Dt  Sep  Exp  Exp Amt V
VT     IMPR PEN A&A
Inc    Del ----- Calc Inc 682.00
Mthd   Freq    Amt 1 V    Amt 2 V    Amt 3 V    Amt 4 V    Extra V
AM     682.00 AL

More

Application/Benefit
Ever received  Type Stat Date Del
SSI?

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Code Amounts Separately in ACES

TRAINING

UNEARNED INCOME - UNER

UNER 01
00

Month 06 12

Client Name JAVA

JOE

Client ID 002451222

Srce	End Date	Claim Number	Lump	Sm	Dt	Sep	Exp	Exp Amt	V
SS		668382110A							
Inc		Del	-----						Calc Inc
Mthd	Freq	Amt 1	V	Amt 2	V	Amt 3	V	Amt 4	V
AM		900.00	AL						Extra V

Srce	End Date	Claim Number	Lump	Sm	Dt	Sep	Exp	Exp Amt	V
Inc		Del	-----						Calc Inc
Mthd	Freq	Amt 1	V	Amt 2	V	Amt 3	V	Amt 4	V
									Extra V

More

Application/Benefit

Application/Benefit

Ever received	Type	Stat	Date	Del	Type	Stat	Date	Del
SSI? N								

Message

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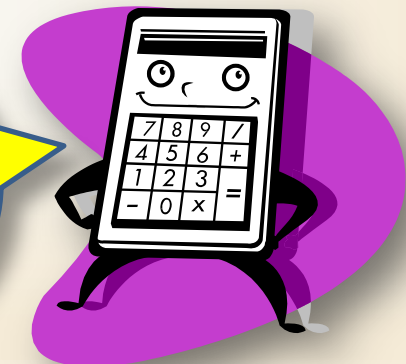
20-lmen

24-del

Improved Pensions – UME Calculator

- Excel calculator was created to help determine how much of the Improved Pension benefits are paid because of the medical expense disregard (UME)
- The calculator **ONLY** works for Improved Pensions
- Do **not** use it for other benefit types – you will have to rely upon the Veteran Benefit Chart

Here I am
to save
the day!



Improved Pensions – UME Calculator

- To use the calculator you will need to know the:
 - Total amount of the veteran benefit being paid
 - Different components of the benefit – such as A&A, housebound or dependent allowance.
- You do **NOT** need to know if the veteran is claiming medical costs or how much
- Access the calculator from the ADSA intranet site for HCS: <http://adsaweb/hcs/FTDocuments.htm>
- Scroll down to VA Income and TPL Training then choose the link for the calendar

2012 VA Improved Pension, A&A, and UME Calculator

Improved Pensions only!
Do **NOT** use for other Benefit types

Name

CL ID

Step 1 - Enter the Clients Gross Monthly Improved Pension Amount

Step 2 - Select Maximum VA Improved Pension Available to Client by Type

Improved Pension - Veteran

<input type="checkbox"/>	Basic Pension	0.00
<input type="checkbox"/>	Aid & Attendance	0.00
<input type="checkbox"/>	Housebound	0.00
<input type="checkbox"/>	Dependent Allowance	0.00

Improved Death Pension-Survivor

<input type="checkbox"/>	Basic Death Pension	0.00
<input type="checkbox"/>	Aid & Attendance	0.00
<input type="checkbox"/>	SAW Surviving Spouse A&A	0.00
<input type="checkbox"/>	Housebound	0.00
<input type="checkbox"/>	Dependent Allowance	0.00

Step 3 - Calculate Other Family Income (do not include SSI)

Income Source (Veteran's, Spouse's and Dependent's income)	Amount
	900.00
Total Other Family Income	900.00

Step 4 - Breakdown of Actual Benefits by Type

Client's Actual Check Amount	0.00
A&A or Housebound - VT on UNER in ACES	0.00
Dependent Allowance - VA on LTCD for spouse/INST for child	0.00
Countable Pension - VA on UNER in ACES	0.00
UME - VU on UNER in ACES	0.00

Clear Form

Improved Pension Benefit Mix

Improved Pension Example 3:

Veteran without dependents receives an Improved Pension of \$1703 including A&A. Also receives \$900 SSA. Veteran is claiming out-of-pocket medical costs.

How can someone with other income still get the maximum VA Benefit????

A claim of UME!

- \$121 Basic Pension is countable_for SSI related medical
 - UNER Code VI
- \$682 A&A is excluded for SSI related medical
 - UNER Code VT
- \$900 UME excluded for SSI related medical
 - UNER Code VU

Improved Pension Benefit Mix

- Maximum VA Benefit Amount is \$1644
 - \$1021 Basic
 - \$682 A&A
- VA first reduces the Basic pension by the other household income.
 - $\$1021 - \$900 = \$121$ Countable Basic Pension
- All other household income has been used so the A&A is not reduced.
- Medical expenses claimed offset some or all of the other household income and restore up to the maximum benefit

2012 VA Improved Pension, A&A, and UME Calculator

Improved Pensions only!
Do **NOT** use for other Benefit types

Name **Java Joe**

CL ID **245122**

Step 1 - Enter the Clients Gross Monthly Improved Pension Amount 1,703.00

Step 2 - Select Maximum VA Improved Pension Available to Client by Type

Improved Pension - Veteran

<input checked="" type="checkbox"/>	Basic Pension	1,021.00
<input checked="" type="checkbox"/>	Aid & Attendance	682.00
<input type="checkbox"/>	Housebound	0.00
<input type="checkbox"/>	Dependent Allowance	0.00

Improved Death Pension-Survivor

<input type="checkbox"/>	Basic Death Pension	0.00
<input type="checkbox"/>	Aid & Attendance	0.00
<input type="checkbox"/>	SAW Surviving Spouse A&A	0.00
<input type="checkbox"/>	Housebound	0.00
<input type="checkbox"/>	Dependent Allowance	0.00

Step 3 - Calculate Other Family Income (do not include SSI)

Income Source (Veteran's, Spouse's and Dependent's income)	Amount
	900.00
Total Other Family Income	900.00

Step 4 - Breakdown of Actual Benefits by Type

Client's Actual Check Amount	1,703.00
A&A or Housebound - VT on UNER in ACES	682.00
Dependent Allowance - VA on LTCD for spouse/INST for child	0.00
Countable Pension - VA on UNER in ACES	121.00
UME - VU on UNER in ACES	900.00

The \$90 Improved Pension

- Improved Pensions are adjusted to \$90 when the veteran or survivor:
 - Is not married
 - Has no dependents
 - Resides in a medical facility 90 days or longer, or
 - Expects to be in a medical facility 90 days or longer
- The veteran or survivor keeps the \$90 in addition to the PNA.
- In a nursing home, code the \$90 with income type VZ
 - It won't show on MAFI or on the award letter

Entitlement Programs

- Eligibility is based on injuries, disease or death of the veteran during active duty service
 - **Service connected compensation**
 - paid while the veteran is living
 - **Dependency and Indemnity Compensation**
 - Paid to the veteran's survivors:
 - surviving spouse
 - children
 - parents

Service Connected Compensation

- Paid while the veteran is living
- Benefit amount is based on the percentage of disability tied to ability to perform gainful employment
- Range from 10% to 100%
- 100% VA disability is **not** the same as Social Security or DDDS disability determinations

Extra Payments (add-ons)

For Service Connected Compensation only:

- No Housebound allowance for veteran or dependents
- No Aid & Attendance for the veteran
- Veteran's rated 60% disabled or above may get an extra benefit called Special Monthly Compensation - treated like A&A
- Dependent allowances for
 - Spouse
 - Dependent children
 - Disabled children
- **Disabled spouse** can get Aid & Attendance, called "helpless spouse" benefit

Service Connected Compensation

SERVICE-CONNECTED COMPENSATION										
2.3% COLA	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
VETERAN	\$127	\$251	\$389	\$560	\$797	\$1,009	\$1,272	\$1,478	\$1,661	\$2,769
VET WITH SPOUSE			\$435	\$622	\$874	\$1,102	\$1,380	\$1,602	\$1,800	\$2,924
VET W/S & 1C			\$469	\$667	\$931	\$1,169	\$1,459	\$1,692	\$1,902	\$3,037
Add for each Each additional school child	Additional child over age 18	under age 18	\$23	\$30	\$38	\$46	\$53	\$61	\$69	\$77
			\$74	\$99	\$124	\$148	\$173	\$198	\$223	\$248
Additional for A/A	spouse		\$42	\$56	\$71	\$84	\$99	\$112	\$127	\$141

- The amounts on the “Veteran” row are the countable portions that are the veteran’s income
- The amount on the “Vet with spouse” row are the total for both the veteran and spouse. Subtract the veteran portion from row 1 from the total and the difference is the portion for the spouse.

Service Connected Compensation

SERVICE-CONNECTED COMPENSATION	
2.3% COLA	50%
VETERAN	\$797
VET WITH SPOUSE	\$874
VET W/S & 1C	\$931
Add for each	\$38
Each additional school child	\$124
Additional for A/A	\$71

- Service Connected Compensation
Example 1:**

Veteran is married and receiving Service Connected Compensation (Comp) at 50% disability rating.

\$874	Total amount for veteran with spouse
- <u>797</u>	veteran's amount (code on veteran's UNER VA)
\$ 77	spouse's amount (code on spouse's UNER VA)

Service Connected Compensation

SERVICE-CONNECTED COMPENSATION	
2.3% COLA	50%
VETERAN	\$797
VET WITH SPOUSE	\$874
VET W/S & 1C	\$931
Add for each	\$38
Each additional school child	\$124
Additional for A/A	\$71

- Service Connected Compensation Example 2:**

Veteran is married and receiving Service Connected Compensation (Comp) at 50% disability rating. Spouse receives an extra benefit as “helpless spouse”

← **This is the spouse's A&A, not the veteran's**

\$874 + 71 =	\$945	Total amount for veteran with spouse
- 797		veteran's amount (code on veteran's UNER VA)
- <u>77</u>		spouse's amount (code on spouse's UNER VA)
\$ 71		spouse's A&A (code on spouse's UNER VT)

Dependency & Indemnity Compensation (DIC)

- Paid when veteran dies of service connected injuries, illness or disability
- Paid to surviving:
 - Spouse
 - Dependent children
 - Low-income parents
- Different rate structures based on when the veteran died
 - Before 1/1/93
 - On or after 1/1/93

Dependency & Indemnity Compensation (DIC)

DEPENDENCY & INDEMNITY COMPENSATION							
SURVIVING SPOUSE - VETERAN DIED PRIOR TO JAN 1, 1993					SURVIVING SPOUSE - VETERAN DIED ON OR AFTER JAN 1, 1993 - BASIC MONTHLY RATE IS \$1,195		
PAY GRADE	DIC	W/ A&A	W/ HB	Child age -18			
E-1	\$1,195	\$1,491	\$1,334	add \$296 each	Spouse Basic Rate Plus A&A Plus Housebound Plus 1 child/ No A&A/ No HB Plus 1 child w / A&A Plus 1 child w / HB	Total	Add-On
E-2	\$1,195	\$1,491	\$1,334			\$1,195	
E-3	\$1,195	\$1,491	\$1,334			\$1,491	296
E-4	\$1,195	\$1,491	\$1,334			\$1,334	139
E-5	\$1,195	\$1,491	\$1,334			\$1,491	296
E-6	\$1,195	\$1,491	\$1,334			\$1,787	296
E-7	\$1,236	\$1,532	\$1,375			\$1,630	139
E-8	\$1,305	\$1,601	\$1,444			<i>Rates below paid when veteran was 100% disabled 8 continuous years and spouse was married to the veteran during those 8 years</i>	
E-9	\$1,361	\$1,657	\$1,500			Spouse Basic Rate with add-on	\$1,449 254
E9b	\$1,470	\$1,766	\$1,609			Plus A&A	\$1,745 296
W-1	\$1,262	\$1,558	\$1,401		Plus Housebound	\$1,588	139
W-2	\$1,312	\$1,608	\$1,451		Plus 1 child/ No A&A/ No HB	\$1,745	296
W-3	\$1,351	\$1,647	\$1,490		Plus 1 child w / A&A	\$2,041	296
W-4	\$1,429	\$1,725	\$1,568		Plus 1 child w / HB	\$1,842	139
					CHILDREN - WHEN NO SURVIVING SPOUSE OF VETERAN		
					Unmarried Under Age 18 or if Student to Age 21		
0-1	\$1,262	\$1,558	\$1,401		# of children	Total Payable	Ea. Child Share*
0-2	\$1,305	\$1,601	\$1,444		1 (EPC81)	\$505	\$505.00
0-3	\$1,395	\$1,691	\$1,534		2 (EPC82)	\$726	\$363.12
0-4	\$1,478	\$1,774	\$1,617		3 (EPC83)	\$947	\$315.98
0-5	\$1,627	\$1,923	\$1,766		4 (EPC84)	\$1,128	\$282.05
0-6	\$1,834	\$2,130	\$1,973		5 (EPC85)	\$1,308	\$261.69
0-7	\$1,980	\$2,276	\$2,119		6 (EPC86)	\$1,488	\$248.12
0-8	\$2,175	\$2,471	\$2,314		7 (EPC87)	\$1,668	\$238.43
0-9	\$2,326	\$2,622	\$2,465		8 (EPC88)	\$1,849	\$231.15
0-10	\$2,551	\$2,847	\$2,690		9 (EPC89)	\$2,029	\$225.50
0-10c	\$2,738	\$3,034	\$2,877				

Dependency & Indemnity Compensation (DIC)

DIC Example 1:

Surviving spouse of a veteran receives DIC of \$1532. The veteran died prior to January 1, 1993. Also receives SSA of \$1000.

- **Spouse receives VA of \$1532**
 - **\$1236 Basic DIC is countable for SSI related medical**
 - UNER Code VW
 - **\$296 A&A is excluded for SSI related medical**
 - UNER Code VT
-
- Other income doesn't affect the amount of DIC the surviving spouse receives

Dependency & Indemnity Compensation (DIC)

Dependency and Indemnity Compensation				
SURVIVING SPOUSE - VETERAN DIED PRIOR TO JAN 1, 1993				
PAY GRADE	DIC	W/ A&A	W/ HB	Child age -18
E-1	\$1,195	\$1,491	\$1,334	add \$296 each
E-2	\$1,195	\$1,491	\$1,334	
E-3	\$1,195	\$1,491	\$1,334	
E-4	\$1,195	\$1,491	\$1,334	
E-5	\$1,195	\$1,491	\$1,334	
E-6	\$1,195	\$1,491	\$1,334	
E-7	\$1,236	\$1,532	\$1,375	
E-8	\$1,305	\$1,601	\$1,444	
E-9	\$1,361	\$1,657	\$1,500	
E9b	\$1,470	\$1,766	\$1,609	

\$1532 Total amount of DIC

—1236 Countable Portion of DIC

Coded as VW on UNER

\$ 296 Excluded Aid and Attendance

Coded as VT on UNER

Dependency & Indemnity Compensation (DIC)

DIC Example 2:

Surviving spouse of a veteran receives DIC of \$1745. Spouse was married to the veteran for 10 years and the veteran was rated 100% disabled. The veteran died after January 1, 1993. Also receives SSA of \$1000.

- **Spouse receives VA of \$1745**
 - **\$1449 Basic DIC is countable for SSI related medical**
 - UNER Code VW
 - **\$296 A&A is excluded for SSI related medical**
 - UNER Code VT
-
- Other income doesn't affect the amount of DIC the surviving spouse receives

Dependency & Indemnity Compensation (DIC)

SURVIVING SPOUSE - VETERAN DIED ON OR AFTER JAN 1, 1993 - BASIC MONTHLY RATE IS \$1,195		
	<i>Total</i>	<i>Add-On</i>
Spouse Basic Rate	\$1,195	
Plus A&A	\$1,491	296
Plus Housebound	\$1,334	139
Plus 1 child/ No A&A/ No HB	\$1,491	296
Plus 1 child w / A&A	\$1,787	296
Plus 1 child w / HB	\$1,630	139
<i>Rates below paid when veteran was 100% disabled 8 continuous years and spouse was married to the veteran during those 8 years</i>		
Spouse Basic Rate with add-on	\$1,449	
Plus A&A	\$1,745	296
Plus Housebound	\$1,588	139
Plus 1 child/ No A&A/ No HB	\$1,745	296
Plus 1 child w / A&A	\$2,041	296
Plus 1 child w / HB	\$1,842	139

\$ 1745 Total amount of DIC

—1449 Countable Portion of DIC

Coded as VW on UNER

\$ 296 Excluded Aid and Attendance

Coded as VT on UNER

PARIS VAMC Interface

- Quarterly interface
 - March
 - June
 - Sept
 - Dec
- Data is up to 6 weeks old when we receive it
- Data file was fixed with the March 2012 to fix some bad codes we were receiving

LTC and Third-Party Resources

- Amounts that are excluded for initial eligibility are not used to calculate participation and are considered Third-Party Resources
 - A&A
 - Housebound
 - UME
- After participation is calculated using the countable portion of the income, the components that are Third-Party Resources are added to the participation
- LTC recipients pay their provider the total of participation and the Third-Party Resources (as well as room & board in ALFs)

LTC and Third-Party Resources

- If a client has a medical expense or other cost that is normally allowed for participation but needs to use some or all of the Third-party resource portion to cover it, an approved ETR is required.
- Code the amount with income code VZ on UNER

UNLESS

The client also receives food. Code that portion as OF – Other Countable FS Only not VZ

TPR - Protecting the PNA

- Surviving spouses receiving Improved Pensions and A&A with no other income receive:
 - \$684 Countable Basic Pension
 - \$410 Excluded A&A – Third-party Resources
- If at home on COPES, their PNA is \$931. Unless the A&A is adjusted, the client will pay
 - \$0 participation
 - \$410 Third-party Resource

TPR - Protecting the PNA

- We must protect the \$931 PNA so the client keeps a portion of the VA TPR
- How much is needed?
 - The difference between the PNA and the countable income
 - $\$931 \text{ PNA} - \$684 \text{ countable income} = \247 needed
- Subtract the \$247 needed from the \$410 TPR
- Client keeps \$247 of the TPR and pays \$163 toward cost of care

TPR - Protecting the PNA

- Code this on the ACES UNER as:
 - \$684 VI
 - \$247 VZ (keeps this portion)
 - \$163 VT
- **No ETR is needed when reducing TPR to protect PNA**

Affect on Cash and Food

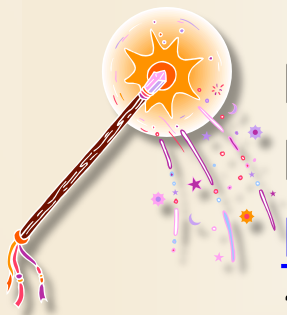
- VA benefits are countable income types for cash and food, including A&A, housebound, and UME.
- Dependent allowances are considered the income of the dependent for whom it is paid, even when the dependent lives out of the home

UNLESS

The veteran or survivor keeps the allowance and uses it to meet their own needs

Final Thoughts

- VA Benefits are complicated
- There are tools available to help you
- If you are really stuck and just can't figure it out Peggy Rezac at HCS HQ can be contacted to help sort out the VA benefit amounts
- Remember to follow your local protocols about requesting help outside of your office/region/administration



Peggy Rezac

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